# **CCTO Micro-Training**

## Creating A Contact Monitoring Event (ME)



#### BEFORE YOU BEGIN, COMPLETE THE FOLLOWING:



1. Check for duplicates (active MEs for the same individual). Search the Monitoring Events Tab and determine if there is already an active monitoring event (ME) for this individual. If there is, update this active ME appropriately and do not create a new one. If you have not found an active duplicate, continue to the next step.



2. Check for past MEs (inactive MEs for the same individual). If an inactive ME for this individual already exists, you can visit their person record and click +New Monitoring Event (from within the person record's Monitoring Events page) to create a pre-populated event in line with the section-by-section guidance below. If you do not identify an inactive ME, continue to the next step.



3. If there is not any ME that matches this person, click +New at the top of the Monitoring Events Tab.

#### Review these key fields when creating a new contact monitoring event:

Fields with \* are required to create your contact monitoring event (ME).

Fields with + are required by the state to track data.

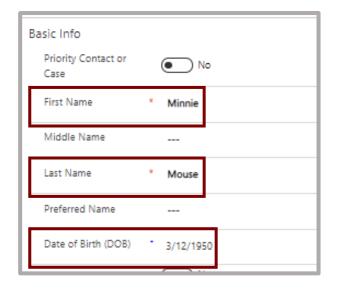


#### #1: Record Information

Contact or Case Patient\*

Associating Your ME With a Person Record
If you have not found another ME that matches

this individual, leave the **Person** field **blank**. CCTO will automatically look for a match upon saving and **1**) associate your ME with an existing person record OR **2**) create a new person record. If the system matches an incorrect person record upon saving, see top of p.5 for next steps.

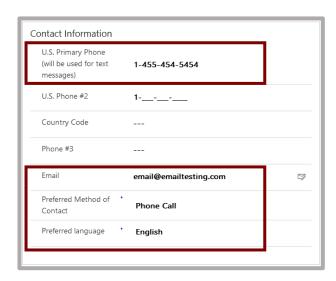


#### #2: Basic Info

- First Name\*
- Last Name\*
- Date of Birth<sup>+</sup> (not used for notification, but used in digital monitoring)

The **Priority Case or Contact** toggle allows you to flag a contact who is higher priority to receive a phone call. **Check with your supervisor and your local policies to see if you should be using this toggle.** 









#### **#3: Source Case Information**

- Ongoing Exposure (if, for example, your contact lives with a case patient)
- NC-COVID Event ID+(for the case patient who named this contact)
- Last Date of Exposure\*
  (If the Monitoring End Date field is blank, it will auto-calculate for 10 days after the date in this field. ACTION: Update Monitoring End Date manually if it needs to be another date.)

#### **#4: Contact Information**

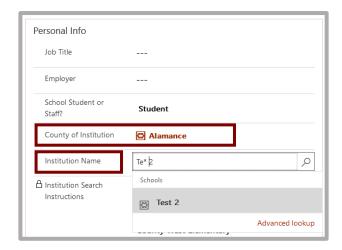
- U.S. Primary Phone (this number will be used for <u>automated text outreach</u> if applicable)
- Email
- Preferred Method of Contact+
- Preferred Language+ (when set to "Text Message" or "Email," a Primary Phone number or Email will become required)

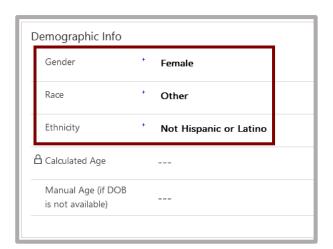
#### **#5: Address**

- Address Line 1 (street address)
- City
- State\*
- Postal Code
- County\* (use county of case if not known)

### #6: Personal Info

- Job Title (if known)
- Employer (if known)
- School Student or Staff? (if known; see next page for additional fields)





# If "Student" or "Staff" is selected within the **School Student or Staff?** field:

- County of Institution (choosing a county will narrow the institutions shown)
- Institution (if known)

Search the Institution field using a wildcard (\*) as a substitute for any unknown text (see p.2). If the institution is not available in the Institution Name dropdown, check the Other Institution field and then enter its name manually in Institution Name (Other). Otherwise, you should leave these fields blank.

## **#7: Demographic Information**

Assign Assign

- Gender+
- Race+
- Ethnicity+
- Manual Age (if no DOB)

Save your work save to finish. If needed, you can then use Assign at the top of the screen to assign this ME to someone else. Single-click "Me" to input a "User or Team" and assign this contact to them.

You're all done!

#### What's Next?

- Your contact will be sent an <u>automated digital exposure notification</u> upon saving as long as you have completed the required fields plus <u>Email and/or US Primary Phone</u> (and "Monitoring End Date" is not set to a date before today).
- If you are a contact tracer, <u>check the roadmap</u>! The <u>CCTO job aids</u> can also help with what
  you need to know about <u>beginning monitoring</u> and <u>documenting your outreach</u>.